PIANC US 100th Anniversary
Vicksburg, 17 April 2002

Panel 1

National and Regional Transportation Plans

Inland and coastal waterways in transportation plans of the EU and Member States

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Contents

1. Who is INE ?
2. IWT and SSS
3. EU & Member States transport policy
4. Positive incentives

Inland Navigation Europe - INE

Platform of national agencies promoting waterway transport

- created in 2000
- with support of European Commission
- permanent Brussels' office since September 2001

Activities

- platform for exchange between partners
- communication and promotion towards users
- communication and promotion towards policy makers

Objective

- shifting cargo

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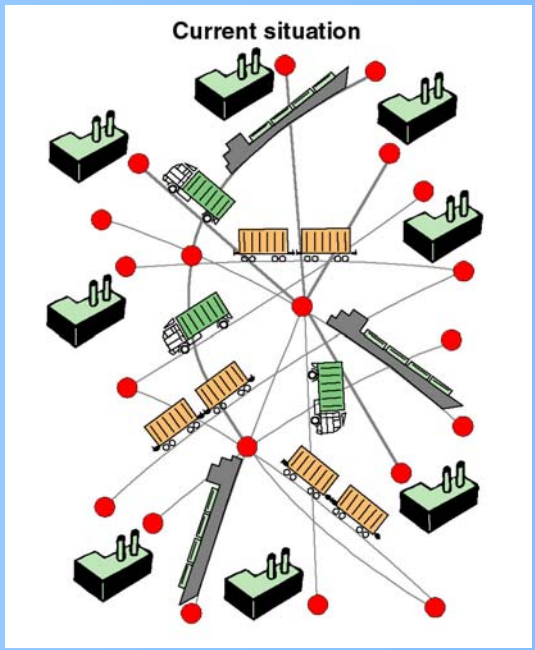
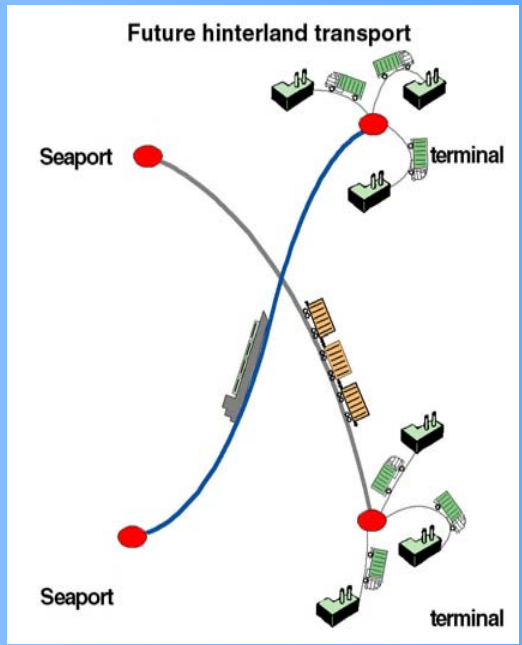
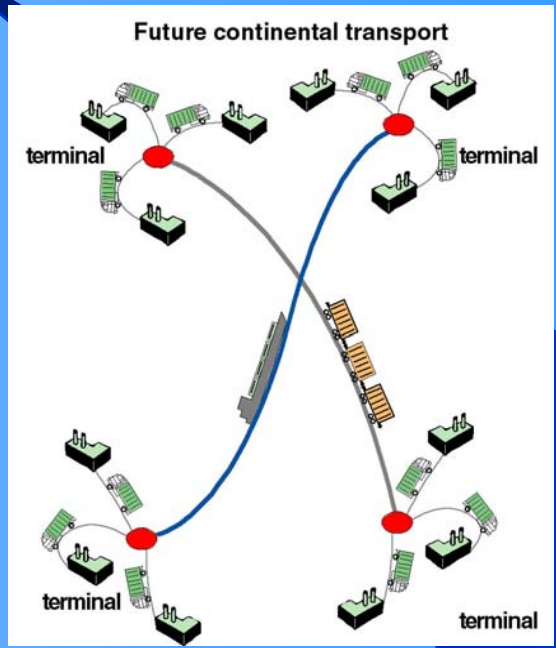
New chances for waterway transport bundling maritime and continental freight flows







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IWT in figures

Modal share in Europe: 6,8% in land transport
but IWT successful if network infrastructure available

- Belgium 11,8%
- Germany 12,8%
- Netherlands 41,6%
- France 9%
- Luxembourg 10,3%

Infrastructure

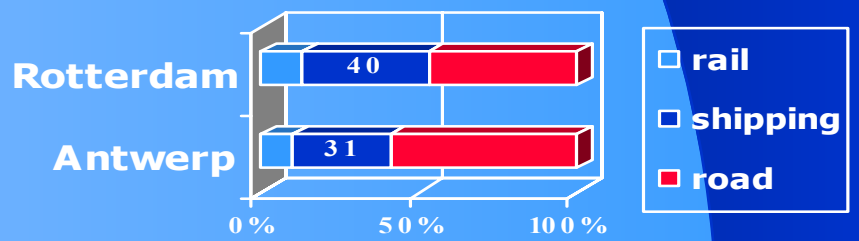
425 mio tonnes/y over 20,000 km (10,000 km > 1,350t vessels)

International traffic

- 50% in tonnes
- 75% in tkm

Growth exceeds forecasts

- 3% average annual growth
- Higher growth for container traffic



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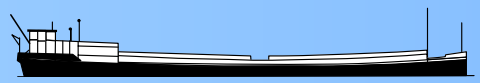
Vessel types in IWT (1)

SPITS - PENICHE

length 38,50 m - width 5,05 m - draft 2,20 m – loading capacity 350 t

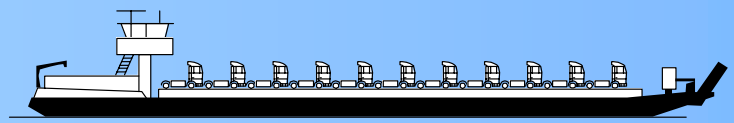


KEMPENAAR - CAMPINOIS

length 63 m - width 6,60 m - draft 2,50 m – loading capacity 550 t

DORTMUNDER

length 67 m - width 8,20 m - draftg 2,50 m – loading capacity 900 t

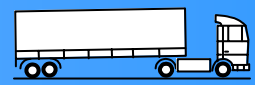


RO-RO SHIP

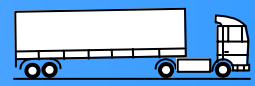
length 110 m - width 11,40 m - draft 2,50 m

TANK SHIP

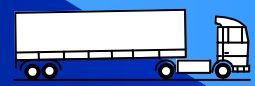
length 110 m - width 11,40 m - draft 3,50 m – loading capacity 3000 t



14X



22X



36X

72X

120X

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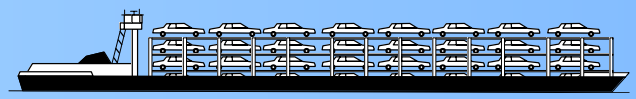
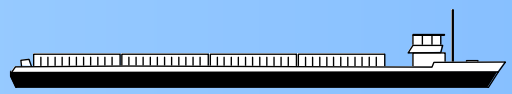
Vessel types in IWT (2)



Car ro/ro vessel

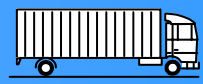
length 110 m - width 11,40 m - draft 2,20 m – loading capacity 600 t

600X

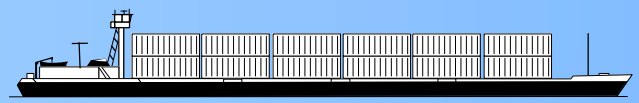


NEO KEMP

length 63 m - width 7 m - draft 2,50 m – loading capacity 32 TEU *



32X

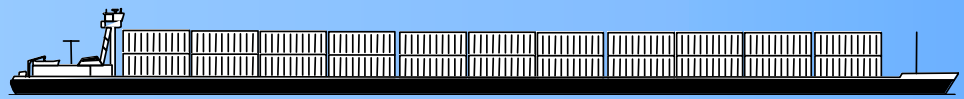


* 1 TEU = 1 ”20 feet” container

CONTAINER SHIP

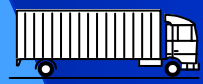
length 110 m - width 11,40 m - draft 3,00 m –loading capacity 200 TEU*

200X



CONTAINER SHIP JOWI-CLASS

length 135 m - width 17 m - draft 3,00 m – loading capacity 470 TEU*



470X

Push convoy (4)

length 193 m - width 22,80 m - draft 2,50/3,70 m

Loading capacity 11.000 t

440X

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Push convoy

IWT vessels 470 TEU and 200 TEU

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Ro/ro vessel

SSS in figures

Modal share in Europe:

- 41% intra EU maritime trade
- Feedering of container traffic
- Ro/ro

Infrastructure

- Unlimited reach
- Limited costs: access ways and ports
- Sea-river: capacity of 1,000t – 10,000t vessels (average 1,500t – 3,000t)

Some weaknesses

IWT

- Network is geographically limited
- Missing links & bottlenecks (drafts, bridges, locks)
- Transhipment necessary - no direct door-to-door
- Environmental impact – NIMBY & short term perception

SSS & IWT

- Accessibility
- Outdated image
- Documentary procedures

Strong advantages

IWT

- Basic network with free capacity complementary small (national) and big (cross-border) waterways
- Growing integration of information technology (RIS)
- Multifunctional waterways: transport, tourism, leisure, drinking water, energy winning, agriculture, flood management, etc.

SSS & IWT

- Growing diversity: all commodities (bulk, ultra size, waste, high value)
- Once on board cheapest way of transport
- Reliability & flexibility
- Environmentally friendly and safe
- Innovation in sector towards multimodal partnerships + cost-efficiency

SRS

- Maritime transport without transhipment to the heart of Europe

Market situation

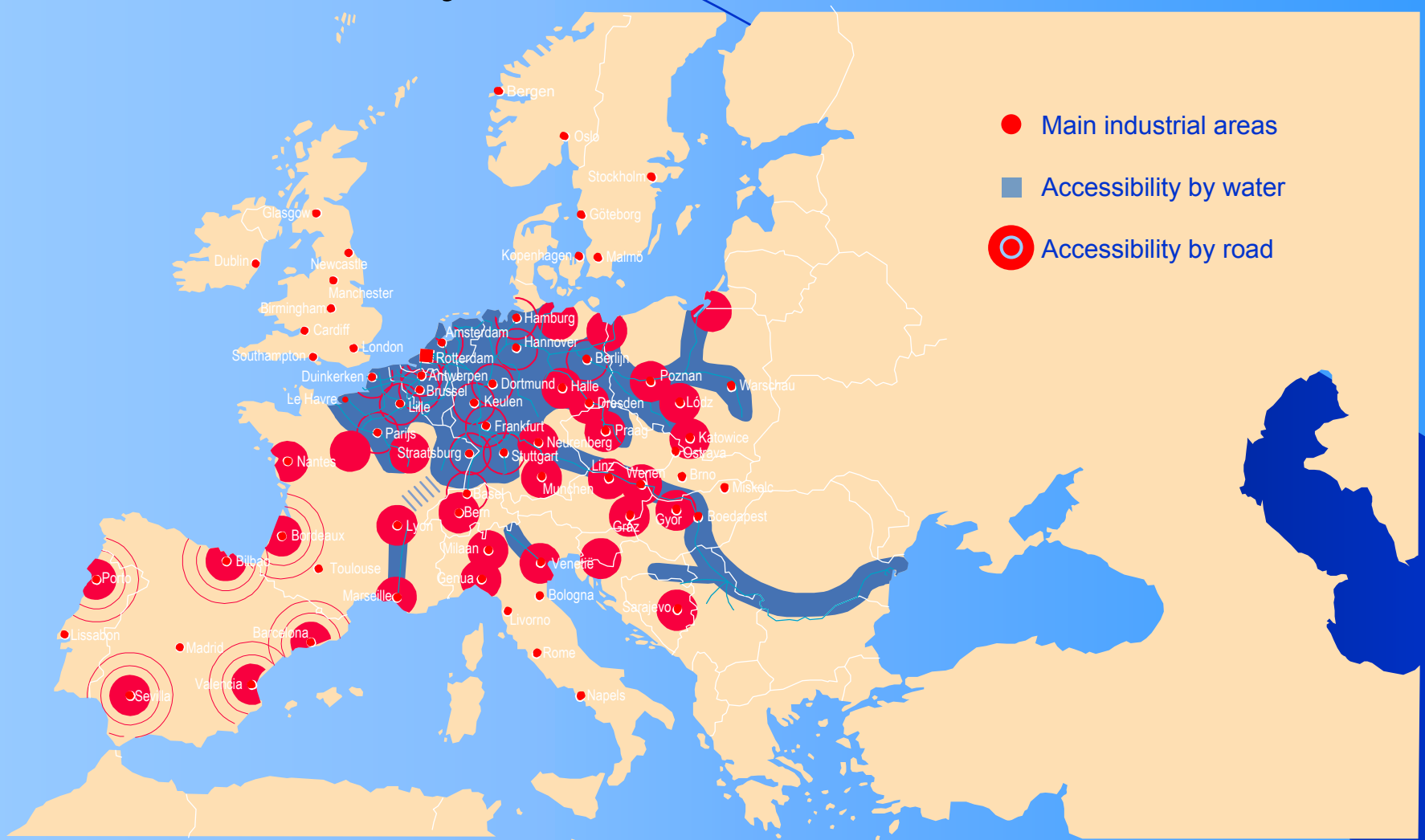
IWT freight

- Traditional: bulk – still biggest share
- Growing: containers, ro/ro, waste, ultra size

New markets – new challenges

- Palets = road market
- Short distance
- Door-to-door
- Frequency of small volumes - floating stock – city logistics
- Partnerships with road operators
- Intermodality and innovation

Accessibility via combined transport road-waterway



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Accessibility via inland & coastal waterways

EU and Member States policy

Nineties

- Sustainable mobility
- Intermodal transport rail-road
- Internalisation of external costs

2001

- Gothenburg Council
- White paper: Transport policy 2010 – time to decide
  1. TENs
  2. Marco Polo
  3. Charging
  4. Specific measures for IWT & SSS

EU transport policy

- Co-decision: European Parliament and Council of Ministers

EC white paper transport policy 2010

Time to decide – debate is open

- Sustainable, environmentally friendly mobility - Europe of the citizens
- Maintaining a competitive business environment

Transport situation

- Modal split
  - Road transport 74.7% - 44.5% when incl. intra EU maritime trade
  - Freight transport demand will increase with 38%
  - SSS & IWT grow but do not absorb road traffic growth
- Congestion
  - 70% of undertakings confronted with congestion problems
  - 10% of TEN roads congested – 20% of TEN rail corridors
- Pollution
  - 84% of CO_2 emissions due to road transport
  - Emissions expected to increase with 50%

1. Trans-European Networks TEN-T

European Commission proposes

Member States decide and implement

- Beyond a patchwork of national priorities
- Interconnecting modal links

Investment guidelines

- Priority projects
  1 waterway project in new proposal
- Selection criteria for other projects

Growing environmental concerns

- SEA directive in new proposal
- Directives on habitat, wild birds, water framework

Horizon of 2010 irrealistic

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1. TEN-T framework

Available budget

- TEN-T: 4.17 billion 2000-06 – 2.781 billion EUR MIP 2001-06
- TEN-T + ERDF + Cohesion F: 18 billion EUR in 2000-06
- ISPA: + 1 billion EUR/y (up to 85 % co-financing)

Financial allocation 2001-06

- 75% multi-annual program (MIP)
    - 50% priority projects
    - 20% Galileo
    - 30% rail, cross-border and other projects
- 25% non-MIP allocated per year
- Rail priority: min. 50% of total budget for rail projects
- 10% co-financing/project – 50% co-financing/study
  20% co-financing for rail and cross-border projects in new proposal

IWT

- TEN-T: 2% of MIP 2001-06 – 7.5% non-MIP in 2001
- ISPA: no IWT projects in 2000-01

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Inland waterways: outline plan of the network (Horizon 2010) Section: Inland Waterways

source:
European Commission

1. TEN-T: what counts for 2004?

Hardware:

developing «motorways of the sea» inland

- European quality net of multimodal waterway corridors
  - Taking away well known bottlenecks in EU
  - Lifting bridges for container development
- Non-discrimination of modes – focus on mobility effect

Software:

River Information Services

Research completed - now implementation

Safety and link to other modes

- One single identification number for vessels
- Standard guidelines for open systems

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2. Marco Polo proposal

Kick off for operations 30 million EUR/y

Positive initiative for modal shift – 3 types of actions

- Environmental bonus of 1-3 million EUR
- Co-financing per international project 30-35%
- Addressing market players – operational aid
- All freight commodities (PACT+)
- Dissemination for replication 0.5 million EUR co-financing
- Flexible administrative framework

Concerns: including all modal shift potential

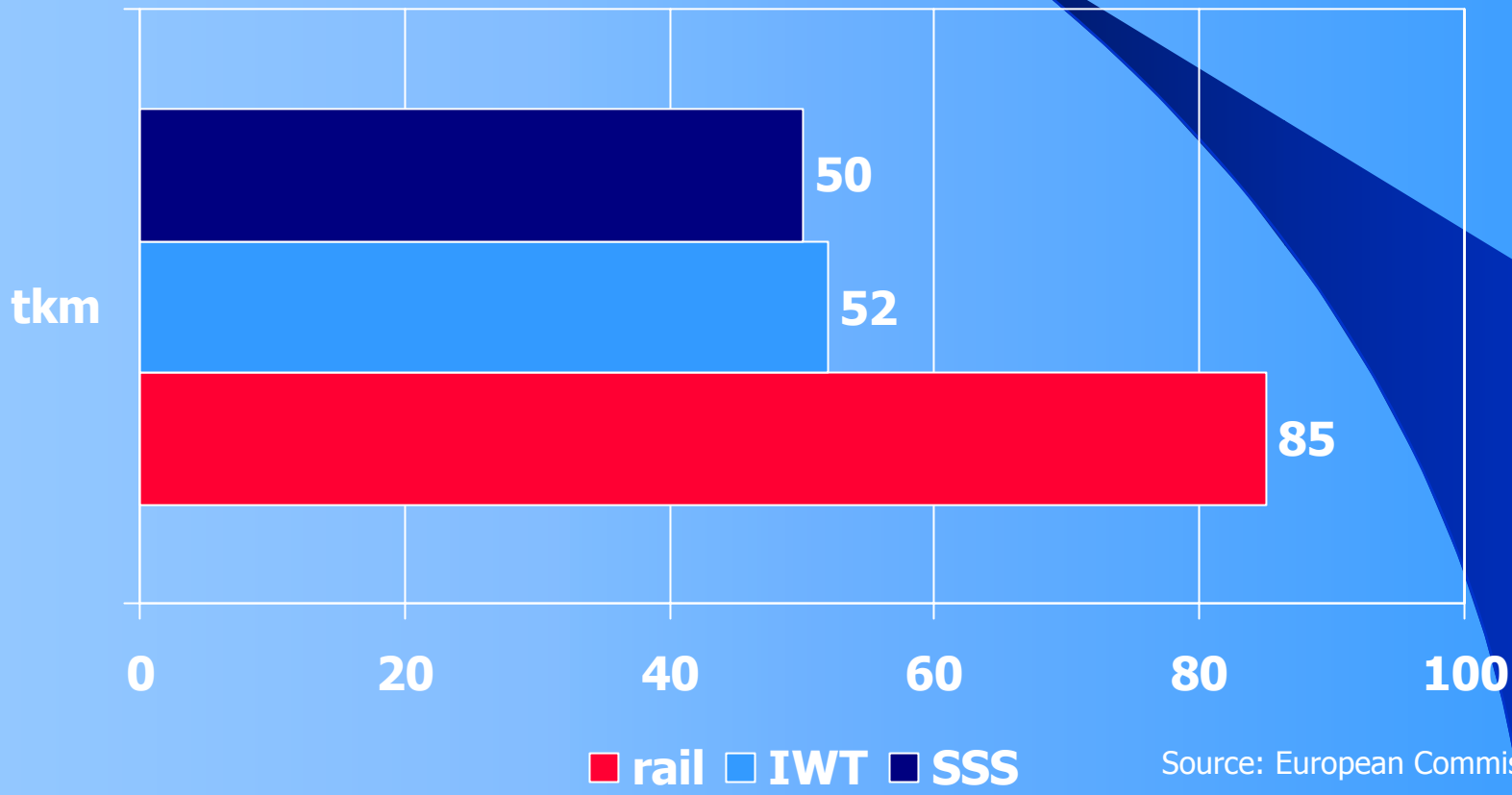
- Access for SMEs
- Need for transparency – penalty clause

National programs

- State aid allowed under conditions by EC Treaty
- Infrastructure and equipment
- Successful in A, B, D, F, I, NL, UK

Waterborne transport and external costs

How many tkm to save 1 EUR external costs vis-à-vis road transport ?



Source: European Commission

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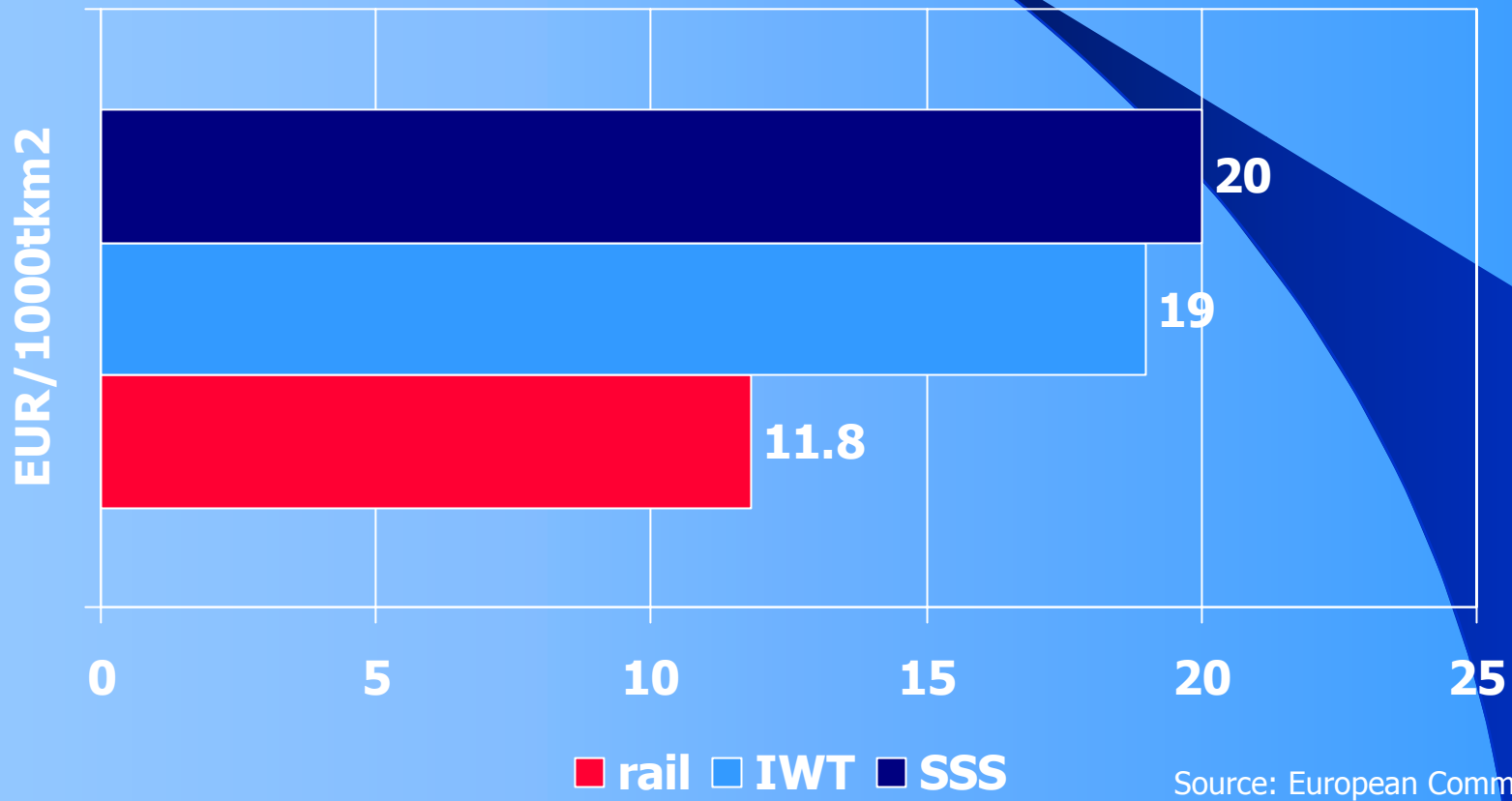
Waterborne transport and external costs

Savings per 1,000 tkm² in EUR

vis-à-vis road transport



Source: European Commission

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3. Charging & pricing

Problem

- Limited resources for infrastructure
  How to finance intermodal infrastructure ?
- Transport 30% of CO_2 emissions – 84% road transport
  Kyoto protocol EU commitment: 8% reduction/1990

Current situation for European waterways

- Rhine and Danube free
- Other waterways navigation rights
- Port dues: transit & handling
- Lock fees
- Waste treatment

3. Charging & pricing

Charging for the use of infrastructure incl. external costs

- User pays principle – reflecting 'real' price for society
- Discussion started in sixties – green & white papers
- Road sector and gradually all modes
- Communication in Spring – Draft directive in Autumn on common methodology for setting charging levels

$ to infrastructure, extra $ to environmentally sound alternatives

National examples: D, SE

Harmonized taxation for fuel

- Huge differences between Member States
- Commercial transport

Tax exemptions for bio-energy use

- New proposal

  - Enormous resistance from industry & road sector
  - No data exc. road transport
  - Multifunctional use of waterways
  - Environmental standards

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4. Specific measures

IWT

- Standardization of technical requirements
- Harmonization of boatmasters' certificates
- Harmonization rest periods, crew members-composition, navigation time
- No scrapping framework: penalty for new construction counterproductive
- TEN: & waterway project
- Marco Polo

SSS

- Simplifying regulatory framework for customs, administrative and documentary procedures
- Tightening safety rules in cooperation with IMO & ILO
- Developing European traffic management system
- Revision State aid guidelines
- TEN & Marco Polo: establishing 'motorways of the seas'

A policy framework for business to operate optimally

- ✓ Trans-European networks: hardware
  - Address infrastructure bottlenecks

  Trans-European networks: software
  - Accompany deployment of RIS

- ✓ Marco Polo: kick-off for operations

- Waterway branches: exit from the highway

- Platform for administrative bottlenecks: public and private must talk

- Raising awareness: supporting education and vocational training

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Waterway branches

Exit from the motorway …

Linking up the modes into multimodal network requires

- interconnection for door-to-door
- access to waterway infrastructure
- efficient intermodal transhipment infrastructure

… by establishing links to waterways

Encouraging public private partnerships

- flexible administrative framework
- strong commitment between new infrastructure and cargo
- compensating initial higher costs of modal shift

Platform for IWT administrative bottlenecks

Public & private must talk

- No 24h navigation
- Customs bottlenecks
- Port systems, etc.

Take away barriers preventing
development of intermodal door-to-door solutions

Ultimate goal: modal shift to waterways

- Bottleneck exercise with regular inter-active exchange
- MS officials – industry representatives – EC
- Best practices – concrete recommendations – pragmatic solutions
- Regular consultation and follow-up on website

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Raising awareness

Waterborne transport

- No awareness
- Outdated image

At national and European level

- Information and promotion activities: INE & ESN
- Attract young professionals
- Support multimodal education & vocational training for logistics organizers

Thank you for your attention

For further information

www.inlandnavigation.org